



## GUIDANCE: NEW CHARTER PETITION

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Idaho Public Charter School Commission

304 North 8<sup>th</sup> Street, Room 242

Boise, Idaho 83702

Phone: (208)332-1561

[pcsc@osbe.idaho.gov](mailto:pcsc@osbe.idaho.gov)

Alan Reed, Chairman

Jenn Thompson, Director

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## Welcome

Welcome to Idaho's public charter school sector. This guide is intended to give you tools for successful navigation of the charter petitioning process. We'll provide some basic information about public charter schools and an outline of the petitioning process, then focus primarily on recommendations for drafting your petition.

As you may be aware, public charter schools operate under a grant of authority from an authorized chartering entity, or authorizer. The majority of Idaho's public charter schools are authorized by the Public Charter School Commission (PCSC). Although this document reflects the priorities of the PCSC, it may also be used to support the efforts of petitioners seeking authorization by local school district boards or institutions of higher learning. However, you should be sure to check with your potential authorizer regarding any policies, processes, or requirements that may apply.

The PCSC's office, located in Boise, has a full-time staff that stands ready to assist you, should you choose to petition to the PCSC. We appreciate your interest in taking on this challenge and invite you to contact us anytime with questions or concerns.

## History & Structure

Idaho's original charter school legislation passed in 1998. At that time, only local school district boards could authorize public charter schools. This worked well for many schools, but in other cases, sufficient difficulty arose that the legislature identified a need for an alternative, independent authorizer. The Public Charter School Commission (PCSC) was created in 2004 to fulfill this role. The PCSC currently authorizes the majority of Idaho's public charter schools.

The PCSC's seven members hail from all around the state. Commissioners are appointed by the Governor (3 members), Senate Pro Tempore (2 members), or Speaker of the House (2 members). They serve four-year terms, and officers are elected every two years in the spring.

The PCSC is staffed by the Office of the State Board of Education.

## The Authorizer's Role

The PCSC's statutory role is one of oversight. We seek to fulfill this role with an attitude of service and look forward to working with you toward a mutual goal of providing Idaho's students with many diverse, high-quality schools of choice.

*The Public Charter School Commission's mission is to ensure PCSC-authorized public charter schools' compliance with Idaho statute, protecting student and public interests by balancing high standards of accountability with respect for the autonomy of public charter schools and implementing best authorizing practices to ensure the excellence of public charter school options available to Idaho families.*

In accordance with Idaho statute, the PCSC sets expectations for performance and holds schools accountable for results. We support schools' autonomy by refraining from dictating their inputs or controlling their processes. Instead, we establish a consistent standard for performance outcomes while freeing schools to manage their operations as needed, within the bounds of the law, to meet or exceed that standard. We believe in the foundational concept that public charter schools exchange increased autonomy for increased accountability, and strive to uphold both sides of that equation.

The PCSC is responsible for prudent evaluation of new charter petitions, as well as the oversight of existing public charter schools' academic, operational, and financial statuses. The bulk of our focus is on academic outcomes, but schools' operational compliance and financial health are also important to ensure the protection of student and public interests.

During the petitioning phase, we will focus on your proposed school's likelihood of success. This process involves thoughtful consideration of factors such as community need, market interest, financial resources, viability of the academic program, access to appropriate staffing, and capacity of your board of directors. The following sections provide guidance for presenting this information effectively in order to increase your opportunity for success.

## Petitioning Process

Idaho statute describes the process through which the PCSC may consider new charter petitions. We strongly advise that you take an hour or two to familiarize yourself with Idaho's entire [charter school statute](#). The petitioning process is addressed specifically in [§33-5205](#), Idaho Code. Administrative rule and PCSC policy provide additional structure.

The next page offers a summary of the petitioning process. Be sure to take note of all timelines and deadlines so that you don't encounter unnecessary delays.

Deadline	Task	Notes
None	Write your petition	Statute provides a list of four areas that petitions must address (more for proposed virtual schools). Administrative rule provides additional direction. This guide is designed to offer additional assistance.
None	Submit completed petition and letter(s) to local school district superintendents	Your letter(s) should notify the school district(s) overlapped by your proposed attendance area that you are seeking an authorizer. The district(s) cannot deny or delay your petition, but they may ask you to attend a meeting to discuss the matter.

<p>4 weeks after letter/petition submitted to district,</p> <p><i>AND</i></p> <p>By Sept. 1</p>	<p>Submit your petition to the PCSC office</p>	<p>It is possible, by mutual agreement with the district superintendent(s), to submit your petition to the PCSC before 4 weeks have passed.</p> <p>Statute allows authorizers to receive petitions later than September 1 by mutual agreement, but missing this deadline may make it difficult to meet the non-negotiable January 1 deadline below, so exceptions to the deadline are rare.</p>
<p>Within 12 weeks</p>	<p>The PCSC office will notify you of your hearing date and recommendation to the PCSC</p>	<p>During this 12 weeks, PCSC staff will provide an initial review of your petition and offer you an opportunity to make revisions.</p> <p>PCSC staff will conduct a board capacity interview during this period. Please see the Board Governance Resources section of the PCSC website for more information.</p> <p>Revisions must be received at least 30 days prior to the end of the 12-week review period. They must also be received at least 30 days prior to the regular PCSC meeting at which your petition will be considered. Exact timelines are unique to each petition, but don't worry – we'll walk you through it.</p> <p>After any requested revisions are received, we will notify you of your hearing date. We will also advise you of PCSC staff's recommendation (deny, approve, or conditionally approve) so you may best prepare for your hearing.</p>
<p>None</p>	<p>PCSC hearing</p>	<p>Your petition will be heard at the earliest regular PCSC meeting that allows time for appropriate review and revision of the petition.</p> <p>At the hearing, the PCSC may approve, conditionally approve, or deny your petition. There is no option for delaying a decision, so you'll want to be sure the PCSC sees your very best work at this time.</p>
<p>By Jan. 1</p>	<p>Petition must be approved in order to open the following fall</p>	<p>The PCSC typically holds its last regular meeting of the year on the second Thursday in December, so be sure your petition is prepared in time for inclusion on that agenda in order to meet the January 1 approval cutoff.</p>

## Formatting & Submission

Your petition includes two sections: the petition narrative plus a set of appendices. The narrative and the appendices may be submitted in one PDF. However, if the file is too

large, it may be submitted in two separate PDFs. Please note that all budgets should be both embedded in the PDF and also submitted separately in the PCSC MS Excel template.

Bear in mind that your petition represents a request for a grant of authority to manage large sums of taxpayer funds and children's educational futures. Take care to present yourself professionally through clear writing, accurate budgets, and thorough proofreading.

Before submitting your documents, check for any pages where information may have accidentally been cut off. (This is especially common when Excel files are converted to PDF.) Also ensure that your table of contents is accurate, page numbers are visible, and any hyperlinks are functional. In PDF documents, bookmarks are extremely helpful for navigation.

Your petition, and particularly the appendices, may be large enough that emailing the documents is impractical. Feel free to deliver them to our office on a flash drive or send them via the free, online file sharing system Dropbox.

If you aren't familiar with hyperlinking, bookmarking, or use of Dropbox, you are welcome to contact the PCSC office for a quick tutorial.

Please note that when you receive PCSC staff feedback on the first draft of your petition, you will have the opportunity to revise and resubmit. When making edits to your petition, with the exception of changes to the PCSC budget and facilities templates, please use legislative formatting. See [The Idaho Rule Writer's Manual](#), section II.4, pg. 36, for instructions in the proper use of legislative format. Please do not use "track changes" or the "show markup" feature in Microsoft Word as a substitute for legislative formatting. For more information, see PCSC Policy Section II.B, which contains additional requirements related to the submission of petitions and petition and revisions.

## Petition Narrative

New charter petitioners often want to know what information should be included in their petitions, and to what level of detail. While every petition is unique, the guidance that follows is designed to help you understand what the PCSC will need to know in order to make a well-informed authorizing decision.

A Standards of Quality document provides more specific guidance for each section of your petition.

Statute requires that you describe the following in your charter petition:

1. Educational program, including academic proficiency and growth standards and measurement methods and any mission-specific standards that may be unique to the school.
2. Financial and facilities plan.
3. Board capacity and governance structure.
4. Student demand and primary attendance area.
5. School leadership and management.
6. For virtual schools, additional elements are required. The PCSC also requires that these elements be included in proposals for blended programs.

Administrative rule elaborates on these categories, providing additional detail regarding the required contents of your charter petition. Each of these requirements, along with some PCSC recommendations and lists of required supporting documentation, is detailed in the following pages.

We encourage you to spend plenty of time thinking through each section of your developing petition. Hold discussions with your founding group. Do the necessary research and tap experts as needed for advice. Gather documentation to support your financial and facilities plans. Write and edit carefully, then wrap up with a final check to be sure you have addressed all the suggestions and requirements provided below.

## Introduction

### Cover Page

Please include the following on the first page of your petition, for easy reference:

- Name of Proposed School
- Proposed Opening Year
- General Location (This may be a school district, city, or county rather than a specific address.)
- Contact Information (For primary liaison between PCSC staff and your petitioning group. If this is employee or contractor, please include contact information for your board chair as well. Name, mailing address, daytime phone, and email are important.)

### Table of Contents

Please verify that you have included accurate page numbers. Hyperlinks or bookmarks are especially helpful.

### Executive Summary

Take one page to introduce your proposed school to the PCSC. Provide a succinct description of your proposed organizational structure, educational program and the community need it is intended to meet, and the academic outcomes you expect it to achieve. Remember to keep it brief and to the point; you'll flesh out the details later.

## **Mission Statement**

Good mission statements are easy to read, but often challenging to write, so plan on putting some careful thought into this section. Ultimately, your mission statement should convey, in just a sentence or two, the following:

- What your school does (example: Provides an exceptional academic foundation to students in grades 9-12),
- How your school does it (example: through the implementation of a research-based, experiential learning STEM program),
- And why (example: in order to expand future career options for demographically diverse students in our low-income community).

Be sure that your mission can be implemented upon the school's opening, not a goal you intend to reach after several years of operation.

You may also choose to include an optional vision statement or a set of core values. These may be included in the executive summary page and should be separate from the mission statement. Vision statements project the impact your school will have over time. Core values are shared beliefs that guide decision-making. The following are examples of a vision statement and core values:

- Vision: Our students will be prepared to lead successful lives as part of a larger community.
- Core Values: Honesty, Hard Work, and Kindness

## **Educational Program**

Statute requires that your petition provide a description of your educational program, including academic proficiency and growth standards, measurement methods, and any mission-specific standards that may be unique to the school. This section represents the bulk of your petition narrative and should clearly describe how education will take place at your school, and what outcomes you expect as a result.

Many petitioners struggle to find the right balance between thoroughness and concision. It is important to explain your ideas so that they may be understood by individuals who are unfamiliar with your proposal, but avoid being too verbose or repetitive. It often helps to recruit a skilled editor (ideally, one who is not well-versed in your educational program) to review your draft and offer suggestions.

## **Description of Educational Philosophy**

Here's your chance to describe the heart of your school: its educational philosophy. What do you, as a founding board, believe is critical to a successful education? Think of the description of the educational philosophy as the big picture and provide more details about the model in the key design elements and curriculum section described below.



Provide research to support the proposed educational philosophy and academic model. When citing research, it is best to offer hyperlinks or refer readers to the appendices, rather than copying and pasting at length. Speaking of copying and pasting, be sure to avoid plagiarism. We want to hear about your academic program in your own words.

### **Student Academic Achievement Standards**

This is where the rubber meets the road. The most well-defined educational model is only worthwhile if students actually learn. That said, success can look very different from one school to another, depending on the goals identified and students served.

Think about your anticipated student demographic and how your proposed educational program will serve them. What academic proficiency level do you expect your students to achieve? How much academic growth should they show? Do you have any student outcome goals that are specific to your school's mission? What measurement tools will you use to evaluate proficiency, growth, and any mission-specific data?

Create a bullet-point list to describe, in concrete terms, the outcomes you expect to result from your program. Perhaps you expect 90% of your young readers, most of whom came to you with a history of low achievement, to be proficient in reading by the end of third grade. Maybe you anticipate that the students at your STEM school will show 20% more year-over-year growth in math than a comparison group. Or maybe you plan to ensure an 80% graduation rate among your alternative population, even if some kids take an extra year or two to earn their required credits.

In addition to specific, measurable academic outcomes, it is also appropriate to include some “soft” targets (such as decreased bullying or increased student engagement) in this section.

### **Description of Key Design Elements, Curricula, Tools and Instructional Methods**

This section asks you to describe how your educational philosophy looks when applied in the classroom, covering the nuts and bolts of your proposed academic program.

What are the key design elements of your educational program, without which your school wouldn't be true to your founding vision? Key design elements are a few, straightforward sentences that highlight the unique aspects of your program. Think of it as your “elevator pitch” that provides a quick summary of the defining features of your school. Should your petition be approved, your key design elements will be included in your performance certificate, the legal document that outlines what your school promises to deliver.

Tell us more about your academic model. Some charter petitioners wish to implement an established model, such as Expeditionary Learning, Montessori, or Classical Education. If this is the case for you, consider spending a page or two describing the model. Then, focus primarily on how you will implement the model with fidelity.

Consider also how you will ensure that the model meets state and federal requirements, such as Common Core.

If your model includes the use of an Education Service Provider (ESP) – also known as a Charter Management Organization (CMO) or Educational Management Organization (EMO) – be sure to address your rationale for selecting the particular ESP. What makes it the best solution for an identified need? Describe your expectations and plan for regular evaluation of the ESP.

It is not uncommon for petitioners to propose an educational model that is “based on” or “similar to” an established model. In such cases, it is critical that you explain in exactly what ways your school will adhere to, and differ from, the established model. Why is your variation preferable to the established model? Will you have access to tools (ranging from professional development to curriculum) specific to the model? While it may seem easier or cheaper to imitate or approximate an established model rather than implementing it fully, the reality is that schools taking this route often struggle with low academic outcomes or mission drift down the road. Proceed with caution and expect a lot of questions from the PCSC.

Some petitioners wish to propose new educational models, perhaps based on various studies or their own observations. If you fall into this category, be sure to explain your model thoroughly, bearing in mind that your reader won’t have any prior information around which to build a mental image of your proposal. Consider instructional style, classroom organization, school culture, behavioral expectations, subject-area focus, and any other relevant factors. Explain what you want to do and why you believe it will work, citing as much research and/or experiential evidence as possible.

Some petitioning groups have already identified the curricular materials they plan to purchase. Others prefer to wait on these selections until they have hired an administrator. If you fall into the latter category, include a description of specific characteristics you’ll be looking for in your curriculum choices.

### **Strategies for Effectively Serving Special Populations**

Public charter schools are exactly that: public. While the number of students enrolled may be limited, students cannot be selected based on factors such as academic prowess, athletic ability, socioeconomic status, or special needs. Public charter schools must serve any student who wishes to attend, up to the enrollment capacity of the school, and provide services just like any other public school.

Rather than simply citing or quoting your legal obligations, really think through how your program will offer a continuum of services for all students, including those who have special needs, are at-risk, are gifted and talented, or are English language learners. If your school specifically targets a certain demographic, be sure to explain how your support system is particularly well designed to meet their needs.

Use this section to describe specific strategies your school will employ to ensure that all students feel welcome, supported, and fully served by your program. Be sure that the narrative and the budget are aligned. Here are some questions to consider while you draft this section:

- How will student identification programs such as Child Find and Response to Intervention work within the scope of your educational program?
- How will your facilities meet the needs of students receiving special services? Have you planned for provision of pull-out rooms, group instruction space, computer/science labs, sensory control space, storage for files and materials, etc.?
- What purchases are necessary for successful implementation of your educational model for all students? Consider modified curriculum, accommodated seating options, special software, and adaptive technology.
- How will you staff programs such as 504, special education, ELL, and gifted and talented? Particularly if your proposed school is small or rural, it may prove challenging to recruit personnel. Can you find individuals who are able to wear multiple hats?
- How will you develop and maintain a culture of high expectations, emphasizing every student's personal growth?
- How will you engage families in the process of their child's learning? Be sure to consider families' work schedules and comfort level in the education environment.
- How will you ensure that your communication systems and policies meet the needs of all families? Think about potential obstacles such as language barriers and limited access to technology.
- How will you address the specific needs of low-income students, such as transportation and nutrition?

If you need specifics about your legal obligations, the State Department of Education (SDE) has experts who can assist. Furthermore, several departments at the SDE, provide program manuals regarding various special services. PCSC staff or the SDE's School Choice Coordinator can point you in the right direction to learn more.

### **Professional Development Plan**

Most public charter schools offer a program that is different from those available at other area schools. You may be hiring numerous teachers, and possibly even an administrator, with little or no training in your educational model. As you might imagine, a cohesive professional development plan is critical to success.

Consider what resources will be important for your educators, and how they can be affordably accessed in a constructive and meaningful way. Can your teachers shadow colleagues at similar schools? Are workshops available? Will experts be brought in before school opens, and for follow-up seminars thereafter? Could web-based courses be used as a basis for regular training throughout the year? How can application of your model be built into regular teacher and administrator evaluations? What professional development options will be most effective and affordable? Describe your plan –

including specific training tools whenever possible – in a few paragraphs, including hyperlinks as appropriate.

## Financial and Facilities Plan

Public charter schools offer different opportunities than traditional public schools. Arguably, they do so on a tighter budget. It follows that most public charter schools must choose their spending priorities carefully, and make wise financial decisions, in order to fulfill both their missions and their legal obligations.

Before you write this section, set aside some time for your board to talk about money. (We know, it's not as scintillating as discussing the educational program. But if you can't stay afloat financially, you won't have an educational program, so bite the bullet and have those hard conversations.)

## Fiscal Philosophy and Spending Priorities

How do you, as a board, think about your financial obligations, particularly since charters rely primarily on taxpayer dollars? What level of understanding do you believe is important to maintain regarding the school's finances? How will you ensure you have access to the appropriate expertise for preparation (by staff) and interpretation (by your board) of financial records? How confident are you in your budget projections? Are they conservative or optimistic in nature? What are your fixed costs, and what expenditures could be adjusted if enrollment numbers come in lower than anticipated? What are your must-haves for successful implementation of your educational program, and what can you live without? Do you have a clear understanding of how public schools are funded? (If not, be sure to ask PCSC and SDE staff for help.)

It isn't necessary to answer all of the questions above in your petition, but you should use them as a starting place for discussion. Boil down your board's collective thoughts to a paragraph describing your fiscal philosophy and spending priorities.

Next, be sure to address the following, required information:

## Transportation and Food Service Plans

While Idaho statute does not absolutely require public charter schools to provide transportation and nutritional services to students, many choose to do so in order to ensure their programs are available to all students. This can both promote diversity and reduce attrition.

Your petition should clearly state whether you intend to provide student transportation and/or nutrition. If you will offer these services, describe your plans for doing so. Be sure the details are supported by your budget and relevant documentation in your appendices.

## **Financial Management and Monitoring Plan**

It is important to have clarity regarding the different roles of the school's board and its employees with regard to financial management. In a few paragraphs, explain the nuts and bolts of how your school's finances will be managed.

Describe what tasks will be performed by staff and specify what those staff positions will be. (Most schools employ a full- or part-time business manager.)

Be sure to think about how the school's fiscal policies will address budgeting, processing and monitoring of revenue and expenses, cash flow management, and internal controls. Also plan for how you will develop the school's annual budget, making sure to identify roles, timelines, and the budget amendment process. (This can be addressed at a relatively high level in the petition, but keep in mind that this is an area in which many operational schools struggle.)

Note which fiscal reports your board expects to review monthly, quarterly, and annually. Identify the key status indicators your board will examine on a regular basis. Explain how you will ensure that board members have the necessary knowledge to oversee the school's finances and how you will ensure proper fiscal oversight.

## **Facilities Plan**

Ideally, a charter school's facility is both affordable and reflective of the nature of the educational program. This section of your petition should describe a realistic vision for your facility.

Consider your proposed enrollment and growth plan, class sizes and course offerings, and the nature of your educational program. How much square footage will you need? Will any special features, such as a dance studio or garden space, be required? Does it need to be in a particular area of town in order to ensure access by your target demographic? How much can you afford to spend on a facility, and will that amount cover the necessities you've identified?

The financial details of your facility plan, complete with documentation demonstrating that they are realistic, will be covered in your appendices. Here, simply take a paragraph or two to describe the type of facility that your proposed school will need and can afford.

## **Board Capacity and Governance Structure**

It is difficult to overstate how important a competent, trained governing board is to the success of a public charter school. This section of your petition should provide a clear picture of your founding board, as well as your plans for ensuring that your school maintains an effective governing board in years to come.

## **Description of Governance Structure**

A strong governing board is one that understands its own role and responsibilities and can clearly differentiate these from the roles and responsibilities of the school's administrative team. Take some time to clarify your thoughts regarding your school's governance and management structure. Educate yourself on the difference between governance and management. (It's a great way to shut down power struggles before they start.) Describe your proposed structure in a few paragraphs.

In your appendices, you'll include a chart that defines the roles and responsibilities of the board, administrator(s), and other key figures, such as ESP personnel. You'll be able to refer back to this when crafting job descriptions, refining management contracts, making hiring decisions, and performing evaluations.

## **Board Member Qualifications**

Starting a new school is no small feat. Take a paragraph or two to summarize the capacity of your founding board to accomplish the task. What skill sets are represented, and how are you leveraging them toward your petition's success? Are all your board members engaged, or is one person bearing most of the load? Can you identify any skills gaps that should be filled by additional members, or perhaps by acquiring training in specific areas?

## **Transition Plan**

The ongoing work of your governing board will differ substantially from that of your founding board. It is possible that some of your most dynamic founders are better suited to the startup role than to ongoing governance. ("Founders Syndrome" is a common phenomenon at new charter schools. It occurs when a founder can't let go of the day-to-day work of operating the school, and instead causes damage by attempting to micromanage the administrator, or even teachers. Don't let this happen to you!) On the other hand, founders can be critical to ensuring faithful implementation of the stated mission during the early life of the school.

As a board, have a frank discussion about which members plan to move on and which will stay after the school is operating. In your petition, include a paragraph that describes your board's plan for a smooth transition from founding to governing. Consider whether any skills sets will need to be added or changed. If some members of the founding board are likely to resign from the board in order to seek employment at the school, be sure to note how you will ensure that the remaining membership reflects a strong capacity to govern. Identify potential pitfalls and strategize to avoid them.

## **Board Member Recruitment and Training**

Effective board membership is a skill in and of itself. The best boards are comprised of individuals who understand the board's role and operate within that role. They are clear-eyed about which responsibilities to take on and which to delegate. Additionally, they perform regular self-evaluations that help them identify areas for self-improvement, and they access quality training in order to improve.

In your petition, describe your plan for ensuring that all your board members participate in ongoing board training. PCSC staff can help guide you to opportunities for in-person training; you may also look into books or web-based resources. Consider developing a new member onboarding protocol, and be sure you don't neglect the continued learning of longtime members. Identify specific areas in which all board members should have competency (such as reviewing financial statements) and discuss what tools you will employ to build your board's knowledge base. Be sure any relevant expenses are reflected in your budget.

Additionally, bear in mind that many charter schools struggle to recruit new board members. You'll want to start early – months or years ahead of time – in grooming potential candidates. Include a paragraph describing your recruitment plan.

## Student Demand and Primary Attendance Area

It's especially important to be realistic when drafting this section of your petition. Many new charter schools, especially those located in rural areas and/or serving grades 6 and up, struggle to enroll as many students as they anticipated. Because your school's financial survival will depend upon adequate enrollment, the level of market interest in your idea should be clearly established. Additionally, your primary attendance area will impact a variety of factors, such as your student demographic, transportation expenses, and perhaps your relationship with local school districts.

### Primary Attendance Area

Statute requires that public charter schools define a primary attendance area, the main purpose of which is to identify students who are eligible for the relevant preference in your enrollment lottery. Students who live outside your primary attendance area may still request enrollment, but they'll receive a lower lottery preference than students who live inside the primary attendance area.

Your primary attendance area must be compact and contiguous. Basically, this means that you can't pick and choose certain neighborhoods in order to influence your student demographic. To the contrary, you should make every effort to ensure that enrollment at your school is demographically representative of its surrounding population.

Many public charter schools have primary attendance areas whose borders match those of the surrounding school district. Some encompass two or more complete districts, and others include parts of multiple districts. Be sure to list in your petition all districts that overlap your primary attendance area, and remember that you must notify them of your intentions before submitting your petition to the PCSC.

As you select your primary attendance area, bear the following in mind:

- It is best to plan on providing transportation to students who reside within your primary attendance area, but the state will only reimburse you for transportation within a certain radius of your school. This could make a large primary attendance area too expensive to manage.
- Your school facility must be located within the primary attendance area, so make sure that appropriate real estate is available and affordable.
- Most families want their children to attend school fairly close to home, so select a primary attendance area whose student population is large enough – and sufficiently interested in your educational program – to support adequate enrollment.
- If you select a primary attendance area whose borders are not pre-defined (such as by a school district), you'll need to be extremely specific in defining the area. Plan to use language such as “the west side of First Street” in order to avoid future disputes about enrollment preferences. Avoid simply using a “five mile radius around the school” definition, as this has a way of cutting properties in half and causing confusion.

Once you have defined your primary attendance area boundaries, do some additional research on the area. Demographics (including socioeconomic and racial diversity), school choices currently available, population trends, and similar information should be included.

## **Student Demand**

This section represents an opportunity for you to explain the benefits your proposed school will bring to your community. Describe why your area needs and demands this particular public charter school. Although only a few paragraphs are necessary, they should represent extensive research on your part.

In administrative rule, “need” is defined as the reasons(s) existing schools are insufficient or inadequate. Be sure to include student academic performance data in your discussion. “Demand” is defined as evidence of desire from prospective families to attend the school. Explain why you believe enough families will be interested in enrollment to sustain the school financially.

Do your homework and provide as much concrete data as possible. It is critical that you demonstrate to the PCSC that your proposed enrollment numbers (and the budget that relies upon them) are realistic. You don't want to struggle financially, or even close your doors, due to under enrollment down the road. This is the time to let your inner skeptic have a voice. Estimate conservatively.

Network with community members and survey their interests. Shoot for having at least twice as many interested students as classroom seats to enroll.

## **Student Population**

This section should describe your intended student population and explain how you will serve those students on a practical level. Will your school be located in an area



appropriate to attract the students you plan to serve? How many students do you anticipate will require special services? Are your staffing plan and educational program consistent with your intended demographic?

## Enrollment Capacity

Your petition should clearly describe the enrollment capacity of your school, both overall and by grade level. This section does not need to be long, but it should cover the following:

- Grade levels you intend to serve.
- Total enrollment capacity of the school.
- Exact, per-grade enrollment capacity. (This is necessary for purposes of the enrollment lottery, even if you intend to offer mixed-age classrooms.)
- Growth projection for at least five years, if applicable.

If you plan to expand over time, that information may be best provided in chart form. For example, this hypothetical school plans to increase both the number of classrooms per grade and the range of grades served over its initial ten years of operation:

Grades	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
K	25	50	50	50	50	50	50	50	50	50
1	25	25	50	50	50	50	50	50	50	50
2	25	25	25	50	50	50	50	50	50	50
3	25	25	25	25	50	50	50	50	50	50
4	25	25	25	25	25	50	50	50	50	50
5	25	25	25	25	25	25	50	50	50	50
6	25	25	25	25	25	25	25	50	50	50
7		25	25	25	25	25	25	25	50	50
8			25	25	52	25	25	25	25	50
Total	175	225	275	300	325	350	375	400	425	450

## Community Partnerships and Local Support

Many public charter schools enjoy symbiotic relationships with other entities in their communities. Have you developed relationships with the Boys and Girls Club, YMCA, cultural organizations, science or athletic clubs, or other groups? Do you have supportive connections within the local school district or local government? In your petition, describe any community partnerships or other local support for your proposed school.

## Enrolling Underserved Families

Demographic diversity is a weak point in Idaho's public charter school sector, and one that the PCSC is excited to work with new charter petitioners to improve. We are looking for petitions that contain strong plans intended to ensure that the resulting schools enroll diverse student populations.

As a board, spend some time discussing how you can make your entire community aware of enrollment opportunities at your school. Think about racial, cultural, and socioeconomic diversity, at-risk students, English language learners, and students with special needs. Reach out to community groups who can help you strategize about how best to reach different markets. Plan to have enrollment materials published in languages reflective of the demographics of your primary attendance area. Be sure you can share with families how you'll meet diverse student needs. Consider the practical aspects of access to your school, such as transportation and nutrition programs.

In your petition, include a few paragraphs that describe your strategies for ensuring all families are not only aware of enrollment opportunities, but also feel welcome and confident that quality services will be provided.

## School Leadership and Management

### Leadership Team

This section should describe the intended leadership structure of your school. Consider how leadership roles, from governing board to administrator, differ from one another. Define the school leader positions you intend to fill, making sure to identify who will report to whom, and include a school leader evaluation plan.

### Educational Services Provider

If your school has chosen to work with an Educational Service Provider (ESP), please use this section to describe the services that entity will provide. Be sure to include the following information:

- Description of the ESP, including corporation name, any DBAs, corporate status, time in operation, number and location of schools managed and for how long, etc;
- Academic, operational, and financial performance outcome data regarding schools managed by the ESP;
- The intended role of the ESP at your proposed school; and
- How your board will regularly evaluate the ESP's performance.

## Virtual and Blended Programs

Technology provides interesting, new opportunities for educational programs. If your proposed school will be virtual (also known as online or cyber) or blended (incorporating substantial use of internet-based learning in combination with on-site instruction), you'll need to include a section of your petition that provides additional detail in the following areas:

## **Learning Management System**

This section should explain, on a practical level, how you will deliver educational materials via the internet. What technology platform and curricular materials will you use?

Will you engage a management company whose role is broader than curriculum provision, or perhaps develop your own platform in-house? If the former, clearly define the role of the management company. If the latter, describe your capacity to build and maintain the necessary technology.

Be sure to investigate the track record of any curriculum or management company you are considering using. How are students who have been through their courses performing on normed assessments? Are other schools that use their programs getting good results relative to the demographics they serve? Do they retain students over the long term, or is enrollment turnover high?

## **Educational Program-Virtual and Blended**

Describe how your school will offer a new, high-quality opportunity for families. Bear in mind that Idaho already has a variety of virtual education options for both full-and part-time enrollment, and overall enrollment in virtual charter schools has been on a gradual decline. Additionally, research at the national level raises questions about the academic effectiveness of virtual schools; less is known about the long-term impact of blended programs.

Consider the following: Why does a virtual or blended program represent the best way to fulfill your mission? What student demographic do you anticipate enrolling? What opportunity does your school offer that existing virtual or blended options do not? How will you ensure that students achieve better results at your school than they likely would have if enrolled in a more traditional option?

Explain how your teachers will interact with students through the learning management system and any other means. What is the role of an online teacher? How will your teachers deliver course material and individualize instruction for particular students? How will they assess student work and provide timely, frequent feedback regarding student progress?

Consider who will do most of the teaching at your school: Is it the teacher, the parent, or the technology? How can you leverage your teachers' expertise to maximize student learning?

Many virtual school students report rich social lives despite the fact that they don't attend school in a brick-and-mortar classroom. Explain how you will encourage this experience within your school community. Include a plan for providing school-sponsored opportunities for students to interact with one another.

## **Technology**

We all love technology...when it works. Unfortunately, the opportunity for technical difficulties to arise is amplified at virtual and blended schools. Describe your plan for providing technical support for teachers, students, and families. Be sure to consider how new enrollees will be introduced to the online learning platform and correspondence pathways.

Additionally, discuss how you will ensure that your school is accessible to all students, including those with special needs and English language learners. How will special services, such as speech therapy, be delivered? How will you provide the necessary hardware, software, and internet connectivity required for participation in online coursework?

## **Professional Development**

Many teachers enjoy providing online instruction but doing so may represent a skill set they have not had an opportunity to develop through prior experience. Describe your plan for ensuring that your teachers are well-prepared for both the practical and interpersonal aspects of providing a virtual education. Additionally, address how teacher evaluations will reflect implementation of strategies specific to the virtual environment.

## **Data Collection/Attendance and Course Credit**

Virtual schools must meet the same attendance requirements as other public schools, but they face unique challenges regarding the verification of student attendance. Consider how you will report Average Daily Attendance (ADA) and award course credit. Additionally, address how you will ensure that student work is being completed by the student himself or herself, and that he or she is actively engaged with the material while logged in.

Also, be sure to discuss your practical plan for ensuring student participation in state-mandated tests. What facilities will be used, and how will the necessary technology be provided? Related expenses should appear in your budget.

## **Appendices**

Your appendices should comprise a set of documents that support and expand upon the information in your petition narrative. Be sure to submit the appendices in a single PDF document, with electronic bookmarks to facilitate easy navigation. Please label each appendix as it is listed below. If you need to include additional appendices, feel free to add them to the end. (Just bear in mind that the document will already be quite long, so you should be judicious in your selections.)

### **Appendix A: Budgets and Facilities Options**

Your budgets will be one of the most carefully examined elements of your petition. We recommend that you spend extensive time on their development. Enlist the help of

qualified individuals who understand Idaho public school funding. Consider asking the business manager of a financially stable charter school to weigh in, and seek support from the SDE or Idaho Charter School Network. PCSC staff will provide feedback upon our initial review of the petition in order to guide you toward any necessary improvements.

The PCSC provides templates to help you develop thorough budgets. You may access these online [here](#) (click on “PCSC Petition Budget Template” to download the Excel file). Before you begin, be sure to read the guidelines provided [here](#).

Facility plans are closely related to budgets, and securing an appropriate, affordable facility is often one of the most challenging steps toward opening a public charter school. Negotiating, permitting, and building or remodeling can be time-consuming and expensive. Even for portable classrooms, site preparation and installation can represent a significant practical and financial hurdle. Additionally, facility deals sometimes fall through, leaving nascent schools in the lurch as opening day looms. For these reasons, the PCSC requires most petitioners to provide at least two, realistic facility options. (Exceptions may be made when the group has a guaranteed facility already secured.)

The PCSC provides a template to help you identify, organize, and present information about your facility option(s). The template is available online [here](#) (click on Facility Options to download the Word file). Use the narrative section of the template to describe the facility plan and provide contextual details explaining the supporting documentation that you will include in Appendix F.

In this appendix, be sure to provide the following:

- Appendix A1: Financial Summary (Use Financial Summary tab in template provided by PCSC)
- Appendix A2: Pre-Opening Budget (Use Pre-Opening tab in template provided by PCSC)
- Appendix A3: Three-Year Operating Budget and Break-Even Year 1 Scenario (Use Operational Budgets tab in template provided by PCSC)
- Appendix A4: Cash Flow Projection for Initial Operating Year (Use Cash Flow tab in the template provided by PCSC)
- Appendix A5: Facility Options (Include a completed copy of the template for each of your facility options. Remember that most petitioners must provide two or more options.)

Be sure to fill out the templates completely. Ensure that the information they contain is consistent with both your petition narrative and the estimates, contracts, and other supporting documentation in Appendix F.

Since the break-even budget can be particularly confusing, please refer to the guidance below when completing this section of the budget template.

The purpose of a break-even budget is to determine the lowest student enrollment required to cover the necessary operational and programmatic expenses. Before creating the break-even budget, complete your three-year budgets based on the assumption that you'll achieve your anticipated enrollment goals. This will provide a baseline budget.

Then, beginning with the "year 1 full enrollment" budget numbers, adjust revenue and expenditure line items down until the net balance for the year is zero. This is your break-even budget that reflects your minimum enrollment to remain financially viable.

Even at break-even, your budget must support your proposed program. A good break-even budget considers that some expenses are fixed (such as administrative salaries and utilities) while others are variable based on the number of students enrolled (such as curriculum and technology purchases). It also considers whether purchases proposed in a full-enrollment situation may be cut or delayed without harming the overall success of the program. For example, an expensive equipment purchase may not be crucial in year one, and could be delayed to year three when enrollment numbers are up. On the other hand, a STEM program will not be able to provide the promised educational program if the technology budget is cut too deeply.

Words of caution: A budget plan that achieves break-even by cutting positions, programs, or equipment necessary to provide the program as described in the petition may not be a viable plan. Likewise, a budget that relies on enrollment goals that are significantly higher than local trends in order to achieve a functional break-even budget may be inviable. Finally, a budget that relies on unsecured funds (such as a fundraiser that hasn't taken place, or equipment promised by a company, but not yet received) may not be viable.

## **Appendix B: Articles of Incorporation and Bylaws**

As you know from reading Idaho's charter school statute (you did read it, didn't you?), public charter schools are organized and managed as non-profit corporations. This means that you should have filed Articles of Incorporation with the Secretary of State's office. Include a copy of those Articles (and any amendments thereto) with your petition. Before you do, take note of the following:

- Check how your Articles describe the purpose of your corporation, which should exist for "educational purposes."
- In the section regarding disposal of assets, make sure your language is compliant with §33-5212(2), Idaho Code. It's different from the boilerplate language

- common in Articles for nonprofits. Note that assets purchased using federal funds need to be disposed of differently than other assets.
- If your school will have a different name than the corporation, you'll need to file a Certificate of Assumed Business Name.
  - Make sure your non-profit corporation exists only to operate the public charter school (or schools). Statute prohibits the operation of other enterprises under the same corporation.
  - Be sure your Articles, and any amendments thereto, are signed by your board chair and stamped by the Secretary of State's office.

Note that the list above does not comprise a complete description of Articles contents; it only addresses some of the most common errors made by charter petitioners. Work with your attorney to ensure that your Articles are thorough and appropriate.

Writing the Bylaws for your corporation may not be exciting, but doing it well can save you a lot of hassle down the road, especially if disputes arise. Before adopting your Bylaws and including a signed copy in your petition, enlist the help of an attorney and think through the following:

- Check the items under “Articles of Incorporation” above, and make sure your Bylaws match up.
- Clearly establish these details regarding your board of directors:
  - Minimum and maximum number of members.
  - Length of membership terms. In the beginning, it is wise to stagger term lengths so you don't run the risk of all your board members turning over at once. Name the seats “Seat A,” Seat B,” etc. and assign term lengths to them. Keep track of which member fills which seat in order to avoid confusion as turnover occurs.
  - Term limits, if any.
  - Selection of board members. Is your board self-appointing, voted upon by stakeholders, or a combination of the two? How will nominations be taken? Who can vote, and through what method? When will elections be held? How will mid-term vacancies be filled?
  - Removal of board members. Consider resignation, incapacitation, death, and removal by the board and/or stakeholders.
  - Identification and duties of officers.

Note that the list above does not comprise a complete description of Bylaws contents; it only addresses some of the most common errors made by charter petitioners. Work with your attorney to ensure that your Bylaws are thorough and appropriate.

Finally, avoid copying and pasting from other charter schools' Articles and Bylaws. Many of them contain errors that you could unwittingly replicate. While you may benefit from viewing various examples, take the time to ensure that your own documents are thorough and in compliance with Idaho law.

## **Appendix C: Board of Directors and Petitioning Group**

The expertise of your founding board is very important to the PCSC. Please include professional resumes for all board members. Think of it as applying for the “job” of managing student lives and taxpayer funds.

It is likely that there are individuals involved with your petitioning group in ways other than board membership. Please include a list of all persons who are significantly involved with the petition. Include brief descriptions of each individual’s role in this pre-opening phase, as well as any intended role over the longer term. This list may include both volunteers and employed or contracted parties.

As you work on this appendix, you should also think about whether the listed individuals meet your definition of “founder,” as this will impact their children’s eligibility for an enrollment lottery preference. It is advisable to put the definition in writing to minimize future disputes.

## **Appendix D: School Administration and Organizational Chart**

Having the right leader (whose job title is usually Administrator or Principal) is critical to the success of your school. If you have already identified this individual, list his or her name, contact information, and qualifications here. Include his or her resume.

If you have not yet identified a particular individual, provide a description of your ideal school leader and your plan for successful hiring. Be sure to consider the realities of attracting a qualified professional to a unique program or rural area.

Note that while your administrator does not need to be certified as a superintendent, she or he will likely need a skill set extending beyond that of a typical public school principal. This is because, as a Local Education Agency, your school will be responsible for both school-level and district-level functions and reports.

This appendix must also include an organizational chart illustrating your school’s leadership structure and indicating how school leaders will report to the board.



## **Appendix E: Education Service Provider**

If you plan to engage an ESP, administrative rule requires that you provide details including the company name, a contact within the company, and the intended extent of the ESP's participation in the management and operations of the school. Please include the following:

- A term sheet indicating the fees to be paid by the proposed school to the ESP, the length of the proposed contract, the terms for the contract's renewal, and provisions for termination.
- Copies of the two, most recent contracts that the ESP has executed with operating charter schools.
- A detailed description of the ESP's relationship to the school's board of directors.
- A detailed description of how and why the ESP was selected.
- Evidence that the ESP provides high-quality services to similarly situated schools, if applicable.

## **Appendix F: Supporting Documentation**

This appendix (which may be divided into F1, F2, etc. as appropriate) is the best place to provide supporting documentation for claims made in your petition narrative, budgets, and facility plans.

Be sure to include the following:

- A copy of the letter sent to the superintendent of each district that overlaps the proposed public charter school's primary attendance area pursuant to I.C. 33-5205 (3)(b).
- Any contracts or draft contracts, purchase and sale agreements, etc.
- Any leases or draft leases. These may be for anything from your facility to your printer.
- Any other real estate agreements, including documentation of purchase agreements or donations.
- Any cost estimates, such as for transportation services, facility remodeling, utilities hookups, curricular materials, etc.
- Any facility development proposals, such as for remodeling, new construction, or installation of portables and supporting infrastructure. Be sure to include timelines on which the work will be completed.

In Appendix F, you may also choose to include additional documents that you feel are important to the PCSC's understanding of your proposal.

## Resources

Are you feeling overwhelmed? Take a deep breath. Developing a new charter petition is a daunting task, but you don't need to face it alone. Pull together a quality board and other volunteers to help. Seek out professionals at successful charter schools, many of whom are willing to offer advice. The Idaho Charter School Network, State Department of Education, and our Public Charter School Commission office all stand ready to assist you.

Resist the temptation to hurry through petition development. Take the time to develop a quality proposal that represents the outstanding educational option you hope to provide. Balance optimism with realism. Research your educational program, explain it clearly, and present it alongside a strong business plan that optimizes your likelihood of success.

We appreciate your willingness to take on this challenge. Let us know how we can help.

### [Idaho Public Charter School Commission](#)

304 N. 8<sup>th</sup> Street, Room 242, Boise, ID 83702

[PCSC@osbe.idaho.gov](mailto:PCSC@osbe.idaho.gov)

(208) 332-1561

### [Idaho State Department of Education](#)

650 W State Street, Boise, ID, 83702

[info@sde.idaho.gov](mailto:info@sde.idaho.gov)

(208) 332-6800

### [Idaho Charter School Network](#) & [BLUUM](#)

1010 W Jefferson Street, Suite 201, Boise, ID 83702

[info@idahocsn.org](mailto:info@idahocsn.org)

(208) 336-8400